

**INTRODUCTION FROM OUR CHAIRMAN, SIMON NOBBS**

“Welcome to the U4 Financials and Dream User Group Summer Newsletter.

It seems that everything has changed with the advent of COVID-19 but in many ways ‘the song remains the same’.

Your user group committee is still working for you the members and users of U4 Financials and Dream and we continue to offer workshops. These are now being presented as webinars. We are planning to offer more workshops of shorter duration and would welcome your suggestions on how we might help you with your experience of using the U4 products.

If you have any suggestions for workshops, or ideas the user group could take forward please contact our administrator, Susan Thompson. Her details are at the end of this newsletter.”

*Simon*

**USER GROUP TIMETABLE REMAINING DATES FOR 2020**

<p><b><u>Wednesday 14<sup>TH</sup> OCTOBER</u></b>  <b><u>U4 FINANCIALS – currently webinar</u></b></p> <p><i>Workflow/Procurement</i></p> <p>Host – TBC</p>	<p><b><u>Wednesday 14<sup>TH</sup> OCTOBER</u></b>  <b><u>DREAM – currently webinar</u></b></p> <p><i>Customising &amp; Interfaces Webinar/workshop</i></p> <p>Host – Mike Booty, Independent Dream Consultant</p>
<p>TUESDAY 17<sup>TH</sup> NOVEMBER            USER GROUP COMMITTEE MEETING</p>	<p>Webinar</p>
<p><b><u>Wednesday 18<sup>TH</sup> NOVEMBER</u></b>  <b><u>U4 FINANCIALS – currently webinar</u></b></p> <p><i>Management Accounting/Revaluations/Year End</i></p> <p>Host - Balal Ahmed, Level8</p>	<p><b><u>Wednesday 18<sup>TH</sup> NOVEMBER</u></b>  <b><u>DREAM – currently webinar</u></b></p> <p><i>Management Accounting/Revaluations</i></p> <p>Host - Lisa Armitage, Principal Consultant, Unit4</p>

# FINANCIALS and DREAM

User Group

## Are you a member of our new Community4U?

We're changing the People Experience of everyone working with Unit4.

We would like to welcome all U4Financials users to Community4U! A platform that is a one stop shop where you can directly interact with other U4F peers and experts through our dedicated U4F product forum, share best practices, access information on U4F new releases and documentation, suggest ideas to improve the product, access expert blogs, and be informed about relevant webinars and events. The more we all engage and interact, the more we all benefit.

We would also like to welcome all Dream Financial users to Community4U! Although there's not a dedicated forum to discuss the product or provide product ideas, you can still access the platform to access all the other available areas, namely product news and documentation.

Join our [Community4U](#) today and become one of us!



## But there's more. . .



**Build your network:** Engage with peers, meet people with common interests and build your professional network.



**Professional Growth:** We provide you with many opportunities for professional growth by learning from one another. Be a mentor *and inspire!*



**Connect with a growing Community of Experts:** The community will allow you to connect with other customers, partners and Unit4 People. You will find a place where you can both be helped and help.

Helping People.  
Changing Lives.

### **Unit4 Dream VAT Module**

The U4 Financials & Dream User Group is a great way to feedback to Unit4 what the user community would like to see implemented in Financials or Dream. An example of this is the Dream VAT Module to cater for Making Tax Digital and how we requested additional functionality to refine what to include in the VAT Tax Returns.

At our request and after approval from Unit4, additional criteria have been added to filter the selected details based on values held in the Description and User Fields on the Document Details. In my company, that means we can now finetune our VAT Returns by only including VAT Codes of Standard, Zero and Reduced whereas previously all VAT Codes were included in the VAT Returns.

The item below was kindly contributed by Emilie Voidinh-Morris, Willmott Dixon

**VAT Return Dream Additional Criteria**

These criteria allow document details with one or more specified values in the Description or User Fields to be included (the field must have one of the values) or excluded (the field must not have any of the values).

Multiple values can be specified by using a comma to separate the values. Each value may also be delimited with double-quotes ("), but this is only required if the individual value contains a comma.

**Description**  
 Include  Exclude  Exclude Blank

**User Field 1**  
 Include  Exclude  Include Blank  
S,Z,R

**User Field 2**  
 Include  Exclude  Exclude Blank

**User Field 3**  
 Include  Exclude  Exclude Blank

OK Cancel

**IDEAS AND SUGGESTIONS – USE YOUR MEMBERSHIP VOICE!**

As a member of the User Group please feel free to submit ideas and suggestions that you would like to see with your Unit4 products and use your members voice to influence change! Just contact Susan to submit your ideas and these will then be added for discussion at our AGM which is held in February each year and will influence our timetable of presentations in 2021.

**REMINDER OF CHANGE OF BANK ACCOUNT DETAILS**

For your information please see below our bank account details which changed late last year. Please update your records accordingly if you haven't already done so. Any problems please get in touch with Susan. Thank you.

<b>Bank:</b>	<b>Barclays</b>
<b>Account name:</b>	<b>Financials and Dream User Group</b>
<b>Account number:</b>	<b>93925552</b>
<b>Sort code:</b>	<b>20-98-98</b>

**Administration**

Susan Thompson is your contact for all User Group administration queries. Susan will arrange all workshop attendance and all membership invoicing, but please make sure we have the correct details for invoice submission as this can lead to delays when members wish to attend workshops. Susan can be contacted on – 07787882980 or by email at [susan.thompson@unit4.com](mailto:susan.thompson@unit4.com)